DOCUMENT RESUME

ED 048 224 SP 007 139

TITLE Marketing; Retail Merchandising. Courses of Study, The Business and Commerce Branch. Curriculum RP-32.
INSTITUTION Ontario Dept. of Education, Toronto.
NOTE 53p.

EDRS PRICE EDRS Price MF-$0.65 HC-$3.29
DESCRIPTORS *Curriculum Guides, *Distributive Education, Grade 9, Grade 10, Grade 11, Grade 12, *Marketing, Merchandising, *Retailing, *Secondary Education

ABSTRACT

GRADES OR AGES: Grades 9, 10, 11 and 12. SUBJECT MATTER: Marketing and retail merchandising. ORGANIZATION AND PHYSICAL APPEARANCE: The guide provides outlines for three programs--a 4-year program on marketing for grades 11 and 12; a 5-year program, including a 1-year senior business option, for grades 11 and 12; and a 2-year program for grades 9 and 10. The allocation of time is explained at the beginning of the guide. The guide is printed by letterpress and saddle stitched with a soft cover. OBJECTIVES AND ACTIVITIES: Objectives are set out in detail at the beginning of each unit. Few specific activities are listed, but general suggestions are given. INSTRUCTIONAL MATERIALS: Details are provided of the facilities and equipment needed, together with an 82-item bibliography. STUDENT ASSESSMENT: No provision is made. (MBM)

Curriculum RP-32
5M-67-818

ED0 48224

ISSUED BY AUTHORITY OF
THE MINISTER OF EDUCATION

ONTARIO

DEPARTMENT OF EDUCATION

THE BUSINESS AND COMMERCE BRANCH

COURSES OF STUDY

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL OFFICE OF EDUCATION POSITION OR POLICY.

MARKETING

The Four-Year Program *Grades 11 and 12*

The Five-Year Program *Grades 11 or 12*

RETAIL MERCHANDISING

The Two-Year Program *Grades 9 and 10*

These courses are experimental in that they will be subject to review.
Suggestions for their improvement will be welcomed.

SP007139

TABLE OF CONTENTS

	Page
Foreword	(ii)
The Four-Year Program Courses	
Part I Grade 11	1
Part II Grade 12	9

Part III Grade 11	19
Part IV Grade 12	23
The Five-Year Program - One-Year Senior Business Option	
Part A	28
Part B	30
The Two-Year Program in Retail Merchandising	
Part I Grade 9	31
Part II Grade 10	35
Facilities and Equipment	37
Suggested Procedures for Teaching Marketing	42
Bibliography	45

Notes 1. Four-Year Program
It is expected that Part I would be offered in Grade 11 and Part II in Grade 12. For those schools devoting double time to Marketing, Part III may be offered as the second option in Grade 11 and Part IV in Grade 12. The suggested allotment of time for any one part is one year at five periods per week.

2. Five-Year Program
The course will consist of Part A and as many topics of Part B as time will permit. A minimum of four to five periods a week will be required. Student interest and teacher aptitude will be factors in determining the amount of time given to each topic. For more detail, teachers will find it helpful to refer to the related sections, where applicable, of the Four-Year Courses.

3. Two-Year Program
Part I should be covered in Grade 9, and Part II in Grade 10, each requiring a year of instruction with a minimum of five periods a week. Part I is not a prerequisite for taking Part II. In schools where the subject is offered only in Grade 10, all or some of Parts I and II may be covered, depending upon the time available.

FOREWORD

As a result of the growing need for a revision and enlargement of the courses in Merchandising, or Distributive Education, a committee composed of teachers of these subjects, representatives from business firms and from the Department of Education, met to develop the following Courses of Study. The use of the title, Marketing, is an indication of the intention to broaden the scope of the course. Much of the philosophy which motivated the deliberations is expressed in the ensuing paragraphs.

Aided by automation and by the expansion of facilities the productive capacity of our nation is constantly increasing. In order to maintain production at a high economic level, we are relying upon selling to expand our markets, domestic and foreign. Marketing and selling, the final important steps in the process of turning raw materials into useful products, are becoming generally accepted for their vital role in creating wealth.

As consumers become better educated, more sophisticated and more demanding, the role of the salesman assumes greater significance. The salesman is recognized, not only for the selling process itself, but also for the related services which salesmen are now expected to provide.

Great changes will continue to develop in the distribution process. The need for more skilful marketing, improved sales techniques, better advertising, superior packaging and efficient organization will become more obvious. This in turn will require intelligent and more highly trained employees, and will provide employment for an increasing number of sales personnel.

Principals and teachers should keep in mind that Marketing courses will have **a much** higher probability of success if offered to students with interest in the subject. The development of personality, which should be stressed throughout, can only be achieved if the teaching approach is one which relies on student involvement and participation rather than on a textbook.

Beginning on Page 42, Suggested Procedures for Teaching Marketing and a bibliography are included for the assistance of teachers.

MARKETING

Four-Year Program

PART I

THE PROCESS OF MARKETING

Introduction

The course in Marketing incorporates the content of courses variously titled Salesmanship, Retailing Merchandising, Advertising, to which have been added units covering Transportation, Warehousing, Buying, Market Research, Colour and Design. Its value in the secondary schools is reinforced by the increasing consumer population, expanding volume of production, and growing demand for goods and services. To anticipate and to satisfy our shopping needs requires the foresight, ingenuity, and effort of many people. These courses are designed to provide capable young men and women trained to meet the requirements of this rapidly expanding industry.

General Objectives

1. To develop in students qualities of personality, along with skills and attributes that will be helpful when associating with people in all areas of endeavour.

2. To give to students an understanding of the various aspects of Marketing as activities essential to the well-being of the entire economy.

3. To provide students with the skills and knowledge required for immediate employment in some phase of Marketing.

4. To encourage students to prepare for the responsibilities of future management positions.

Career Opportunities

Marketing covers such a broad area that it offers literally hundreds of different job opportunities. Different types of products and services require different selling methods and different qualities in the salesmen. There are wholesale salesmen, retail salespeople, specialty salesmen and saleswomen, dealer-service salesmen, sales engineers, route or driver salesmen--each with different responsibilities and different characteristics. Students will find marketing opportunities in buying, warehousing, advertising, display, personnel, credit, finance. Businesses in the field of distribution may need the services of bookkeepers, typists, stenographers, switchboard operators--the list is endless, and includes almost every talent, training, and preference. Marketing provides career opportunities unlimited in number and scope.

Channels of Distribution

Familiar forms of organization: from producer to manufacturer, to wholesaler, to retailer, to consumer; new classifications caused by constant changes in distribution procedures and changes in types of ownership: wholesale-manufacturer, wholesaler or jobber, broker, manufacturer's agent, commission merchant, drop shipper, independent retail store, single-line or neighbourhood store, variety store, side-line store, direct retail, automatic vending, specialty shop, corporate chain store, chain of leased departments, mail-order house, consumers' co-operative, closed-door discount house, open-door discount house, supermarket, plaza shopping centre.

BUSINESS ORGANIZATION AND OPERATION

Objectives

1. To give an understanding of the relationship of good location, layout and equipment to the efficiency and success of a business and to provide a basis for evaluating the influence of these factors.

2. To study the many facets of the internal organization of representative businesses and to study their financial structure.

Location

1. Retail Outlet

   Evaluating a town or city for a location, economic factors affecting the choice of a site; methods of evaluating shopping areas and estimating purchasing power: surveys, questionnaires, pedestrian and automobile traffic, newspaper circulation, the volume of trade, number of telephones, automobiles, bank deposits per thousand of population, analysis of the economic production in the area, school and utility figures, competition, transportation and parking facilities, assessment on real property, average income, the buying habits of the residents; space requirements and available facilities; consideration of internal and external physical factors.

2. Manufacturer or Wholesaler

   Cost of shipping; speed of delivery to customers; convenience of sales staff; skilled labour; utilities; raw materials markets; community benefits.

Layout and Equipment of Retail Store

General principles of store arrangement: exterior store front, windows, entrance, interior, controlling customer traffic, aisle space, lighting, ventilation and air conditioning, location of displays, self service, maximum utilization of floor space, location of non-selling areas.

Store fixtures for different types of selling, selecting fixtures--selling and non-selling; planning for the convenience of customers; creating the buying impulse; grouping merchandise; controlling customer buying habits; measuring equipment; cash registers, change-making equipment, mechanized accounting systems, charge-a-plate machines; lighting fixtures; shelving, counters; marking and receiving room equipment; signs--interior and exterior; delivery equipment.

Financial Requirements and Operation

Assessing capital requirements; sources of capital; credit rating; fixed assets; current assets; current liabilities; working capital: equipment; operating expenses; merchandise turnover; safeguards in operating a business; balance sheet ratios and percentages, income and expense ratios, budgeting and control; major causes of business failures; lack of capital, incompetence, inexperience, overabundant credit, neglect, fraud, extravagance, and lack of judgment.

Internal Organization

Organization according to size; advantages and disadvantages of specialization; line and staff organization; distribution of responsibilities; merchandise, publicity, personnel, customer service, operation and transportation, purchasing, store protection, and comptroller divisions.

DEVELOPMENT OF PERSONALITY

The principles outlined in this unit of instruction should be stressed throughout the Marketing Courses in both Grades 11 and 12. It is important that the student should be aware of the value of a pleasant personality, good grooming, and courteous behaviour.

1. Personality: nature; rewards of a pleasant personality; relationship between personality and job competence.

2. Personality Factors: appearance, dress, talk, listen, act physically, act emotionally, act intellectually.

3. Some Facets of Personality: survey of character traits; introversion-extroversion tests; remedial suggestions; dominant, submissive--definitions of terms, submissiveness-dominance tests, remedial suggestions; relation of personalities to basic

job types; avoidance of the pseudo-scientific methods of determining personality: phrenology, astrology, palmistry, graphology, physiognomy.

4. Steps in Personality Development: realization of the need for improvement; personal inventory; required motivation; systematic plan for improvement.

5. Good Grooming: importance; positive values; suggestions for boys and girls; gestures and mannerisms to be avoided; clothes for business and social occasions; clothing budgets.

6. Social and Business Etiquette: proper introductions; when to stand, when to shake hands, who goes first; table manners; tipping.

7. Personality at Work: healthy work habits; attitude; working with others--co-operation, tact, courtesy; personality factors contributing to job success.

8. Good Taste: criteria of good taste in dress, appearance, home and office environment; common errors.

9. Oral Communication: importance of the voice in the communication of information and ideas; delivery--effectiveness of entrance and exit, poise, posture, gestures, facial expressions; voice--audibility, pitch, resonance, flexibility; language--vocabulary, grammatical usage, sentence variety, pronunciation; overall impression--sincerity, confidence, enthusiasm, audience appeal; oral assignments--choice of topic and title, organization and preparation of subject matter, completeness and relevance of material, creation of interest and aptness of illustration; technical production of human voice--effective use of the telephone, public address system, inter-office communication system, dictating machine, tape recorder, microphone.

MERCHANDISE KNOWLEDGE

Objectives

1. To emphasize the importance of product information, and the means of acquiring product knowledge, in preparation for effective selling.

2. To assist students to become more intelligent consumers.

General Merchandise Information

Basic qualities of the product; name of the manufacturer; service, guarantees, and company policies; durability and serviceability of the product; uses and operation; styles, prices and care; quality versus price; competitive products.

Sources of Product Information

Trade journals, advertisements, customer approval, dealer literature, Canadian Association of Consumers, government publications, radio and television, library reference materials, Consumer Reports, Consumer Research Bulletin, manufacturers, salesmen, buyers.

Student Product Manual

Students may be required to prepare a detailed Merchandise Manual. This manual could be prepared on a locally manufactured product and could include the various phases of Marketing. The outline given below deals only with the PRODUCT.

Outline of Product Manual

(a) Raw Materials: sources; selection; handling; storage; quality--reputable company

(b) Process of Manufacture: preparation of raw material; unit production process; assembling of units; workmanship--skilled or unskilled; plant production line routing; production control; outstanding features of manufacturing; qualities--design, colour, durability, care

Relationship of product knowledge to consumer purchasing.

SALESMANSHIP

Objectives

1. To provide the student with a knowledge of the nature, history and function of Salesmanship.

2. To study intensively the qualities, skills, and techniques required for success in Marketing.

Definition of Salesmanship

1. Nature of Salesmanship: the art of persuading, getting along with people; public relations; personality requirements.

2. Place of Salesmanship: history of selling; the salesman as a filler of needs, as a creator of wants; development of the highly-trained career salesman as production outstrips normal consumption; the importance of salesmanship in the North American economy and in the world economy; the need for persuasion in the distribution process; universal use of salesmanship principles by the professional man, technical expert, factory worker, farmer, employer, employee.

3. Status of the Salesman: selling as a profession, as an art, as a science; remuneration.

4. Classification of the Salesman:

   (a) In Manufacturing: sells new products to retailers or industry, provides advice and assistance to the middleman.

   (b) In Wholesaling: sells to retailers and assists the retailer in selling the product to the consumer.

   (c) In Retailing: sells in a retail store--customers usually come to him.

   (d) Specialty: sells directly from manufacturer to the consumer--considered one of the most demanding of all selling occupations; tangibles or intangibles, e.g., encyclopedias or insurance.

<u>The Sale</u>

1. Knowledge of the Product: necessity for complete knowledge: background, uses, appearance, performance, composition, construction, competing products, prices, terms available, delivery policies, instructions for use, care and maintenance, history of the firm.

2. Locating Customers:

   (a) Importance of prospecting;

   (b) Sources and Methods: retail sales promotion (advertising and display), door-to-door canvassing, community organizations, present customers, old and inactive customers, classified directories, professional groups, building permits, tax lists, newspapers, telephone, letters; referral method, centre-of-influence (nest) method, group meeting, sales-associate method.

   (c) Qualifying prospects--social, economic, reliability.

3. The Approach:

   (a) Importance of good approach;

   (b) Preliminary steps--advance information;

   (c) Manner of approach--promptness, interest, enthusiasm, sympathy;

   (d) Approach techniques: merchandise, question, special interest, gift, service, favourite story, reference, survey, greeting; distinction between "hard" and "soft" sell.

   (e) Types of customers.

4. The Sales Presentation:

   (a) Determining the customer's wants and needs

   (b) Objectives and presentation

   (c) Importance of a planned presentation

   (d) Tailoring the presentation to appeal to the senses; determination of sales features; desire-building words; effective demonstration; customer participation .

5. Meeting Objections:

   (a) Reasons for sales resistance

   (b) Types of objections and excuses

   (c) Need for analysis of objections

   (d) Methods of handling objections: agreement, turnaround, superior point, question, flat denial, testimonial, ignoring objection.

   (e) When to handle objections

6. Closing the Sale:

   (a) Necessity for skilful closing

   (b) The best time to close

   (c) Signals for closing

   (d) Methods of closing: ask for the sale, assume the sale has been made, alternative or choice method, offer a premium, indicate necessity for an immediate decision, conditioned close.

   (e) Proper leavetaking

   (f) Importance of "call-backs"

   (g) Unsuccessful closing--proper attitude

   (h) Analysis of lost sales: "What went wrong?" "How can I improve?"

7. Increasing the Sale:

   (a) "Plus" selling

   (b) Methods: trade up, increased quantities, related items, new stock, specials, merchandise for particular occasions.

(c) Handling more than one customer at a time

(d) Reducing returns and refunds by proper handling of complaints and customer problems.

8. Special Sales Techniques:

(a) Telephone: advantage of selling by telephone; use of selling principles--gain attention, arouse interest, create desire....; importance of telephone personality.

(b) Letter: types of sales letters; types of selling situations where letters are most effective; importance of neatness and proper form; the letter as a reflection of personality.

(c) Other mail techniques: brochures, catalogues, samples.

9. Increasing Efficiency through Self-Management:

(a) Management of selling time: making calls, selling quotas, long-range goals

(b) Management of non-selling time: importance of attitude, reading of inspirational material

(c) Counteracting depression: law of averages, value of a positive approach.

PART II

ADVERTISING AND SALES PROMOTION

Objectives

1. To study sales promotion, advertising, display, illustration, colour and design.

2. To show the media and devices of sales promotions.

3. To study the psychology of effective advertising.

Advertising

1. Forms of advertising according to marketing functions: national retail, mail-order, inquiry, trade, industrial and professional.

2. The advertising stages of a product: pioneering, competitive, retentive.

3. Specific purposes: to increase the demand for a product; to attract new markets; to promote, acquaint, and retain goodwill of company; to render public service; to increase the strength of the entire industry.

4. Advertising Agency: development, function, organization; career opportunities.

5. Media:

   (a) Types: use of media in relation to a product or service

   (b) The big "FOUR" of advertising: newspaper, magazine, radio, television

   (c) Evaluation of media: special characteristics, cost, extent of coverage, advantages and disadvantages

   (d) Outdoor advertising: characteristics, forms, trends

   (e) Transportation advertising: selling space, car-card copy, dash posters, traveller displays, taxi posters

   (f) Point-of-sale advertising: nature, forms, method, importance

   (g) Direct mail: purpose, forms, advantages, disadvantages, mailing lists

6. Preparation of Advertisement:

   (a) Copy: structure, importance, point of view, selecting the appeal, types of headlines

   (b) Developing the copy: explanation and proof of claims, advantages of the product, closing the advertisement

   (c) Qualities in writing copy: specific, concise, vivid, readable

   (d) Slogans: definition, forms according to purpose

   (e) Trade-marks: definition, importance, basic requirements, forms and examples

7. Production of Printed Advertisements:

   (a) Parts of an advertisement: importance, function of each part

   (b) Printing: effects produced by different techniques--offset, letterpress, lithographic, intaglio, rotogravure, silk screen

   (c) Photo-engraving: principles, kinds--line plates, half tones and their variations; colour illustration, matrices and stereo types

   (d) Photography: commercial and industrial; practical projects

8. Delivering the Advertisement:

   (a) Newspapers: special characteristics; comparison of morning, evening and weekend newspapers; classified and display advertising; local and national advertising; rates, types of advertisements and position in the paper.

   (b) Magazines: advertising according to function; frequency of publication; general importance; characteristics; types of magazine groups, sizes, rates; business papers and trade journals.

   (c) Radio: local, regional, and clear channel stations; network, spot, and local broadcasts; aspects of network advertising--regional, spot, local retail programs; types of broadcasts--general broadcast, announcements, participating programs; the radio rate structure--special features, discounts, audience size, field intensity maps, popularity of stations; measuring results--telephone, mechanical recorders, personal interviews, diary and mail ballots; forms of commercials--integrated, non-integrated, opening, middle, and closing announcement; time for commercial; writing the commercial--jingle, one-two voice, dealer tie-in, spots with music; criticisms of commercials; assessing results.

(d) Television: forms of telecasting--live, videotape, films, slides, rear-screen projection, kinescope; television networks--coaxial cable, micro-wave relay, shipment of films; rate structure; creating the commercial; television film effects--animation, billboard (graphics), off-screen narrator, lip-synchronization, opticals, dissolves, superimposition, dubbing-in, zooming; impact on the consumer; effect of television on other media.

9. Advertising in Action: the advertising campaign--development of a campaign beginning with a product and taking it through stages of appropriation, research, selling, distribution, advertising, trade mark, and packaging.

Sales Promotion

1. Meaning and definition; development--early development, current practices; purpose

2. Influencing Factors:

(a) store character--effect, determination, preservation

(b) research--reasons for prior research, analysis, experimentation

(c) co-ordination--necessity for teamwork, advance planning

(d) analysis--company, product, customer, competitors

3. Divisions: advertising; display; supplementary activities--exhibits, samples, contests, demonstrations, publicity, fashion shows, banners, streamers, and posters.

Display

1. Principles: importance, function, and objectives

2. Types: window, counter, stock, motion; seasonal, timely, topical

3. Effective displays: purpose; planning; lighting; cleanliness; use of props; placement and types of signs; special effects--size, shape, height, colour, number of items, use of special materials.

4. Modern trends: vertical versus horizontal display, shamming

5. Evaluation: advantages, cost, results

6. Other sales promotion devices; mail-order sales; educational activites; fashion shows; exhibits; press parties; trading stamps; premiums; in-store loud speakers; sales contests.

Packaging

1. Development, definition, principles of presentation, purpose

2. Packaging the product: creating the style; product, trade, consumer requirements

3. Creating a distinctive package: package design--size, colour, shape; packaging--paper, metal, glass, plastic

4. Re-use value of package.

5. Combination packages

6. Redesigning the package: change in product, inadequate sales, research, tradition

7. Packaging research

Labelling

1. Brand labelling

2. Mandatory information

3. Types of labelling: descriptive, certification, compulsory, government.

TECHNIQUES OF BUYING

Selecting Merchandise Suitable for the Store

1. Determining requirements: the type of merchandise to be offered; benefit of consistency in merchandise; lowest price not necessarily the best price; effect of style and durability on demand; the store's aim in meeting the needs of special groups.

2. How much to buy: use of records; results of buying large quantities of slow moving merchandise; significance of too high an investment in inventory; customary turn-over rates for various lines; effect of turn-over rate on a store's ability to meet the needs of its customers; the influence of the community on the amount of merchandise to buy.

3. Where to buy: sources of buying information--sales records, want slips, sales people, manufacturers, trade journals; advantages of dealing with a small number of suppliers; assistance from suppliers; relationships between supplier and buyer--rights, mutual respect, confidence, returning merchandise; buying in the office or in the sample room.

4. When to buy: seasonal effects; influence of holidays; re-ordering; use of stock records; advice of sales personnel

5. How much to pay: price policies of manufacturers and wholesalers; discounts and datings; cash discounts, quantity discounts, trade discounts; terms of payment.

Organizing and Classifying the Merchandise

1. Assortment planning: advantages of assembling stocks whose prices, kinds, colours, and other features reflect the needs and interests of the customers, and the store's position in the community; limitations imposed by the size of the store and the financial condition of the company; dangers of assortment planning; determining the numbers, sizes, colours, and styles; balanced assortments.

2. Item merchandising: advantages in concentrating on a product with proven potential for short-term or long-term volume; discovering customer favourites and appropriate follow-up; meaning of perennials.

3. Price lining: meaning of price lining; advantages of a few versus a large number of price lines; discontinuing a price line; improving control of purchases and stock by the use of price lines; overcoming competition in certain price lines; assistance from manufacturers in price lining; revisions in price lining.

Pricing Merchandise for Sale

1. Setting the rate of mark-up: original cost; expenses, net profit; advantages of a uniform rate of mark-up; competition and the rate of mark-up; advantage of exclusive distribution; consulting sales personnel in pricing; relationship of mark-up to sales volume; relationship of advertising to sales volume; special purchases and the rate of mark-up; pricing procedures; date marking.

2. Deciding on mark-down: Capital investment in inventory; clearing slow-moving items; clearing remainders in style, colour, size, or line; meeting competitor's prices; timing of mark-downs; amount of mark-downs; automatic mark-downs with price tag dated and regular rates of reduction on specified dates.

3. Calculating the price: problems on mark-up, margin, mark-down--extensive drill to build speed and accuracy in calculations.

4. Building a balanced business: advantages and disadvantages of special sales; essentials of proper timing; maintaining a regular proportion of fashion advertising, low mark-on, use of "loss leaders"; clearance sales; the most valuable business--the day-to-day selling of regular goods at regular prices; analysing and listing the correct amount of stock for each item; maintaining staple items in stock; increasing business with additional monthly promotions; constant search for new goods; stressing the most successful lines.

Inventory Control and Planning

1. Inventory records: nature of records; perpetual inventory cards; style activity records, daily report of item activity; theory of unit control; rotated unit control; want slips; buying plan; forms for unit control; style number control; forms used.

2. The merchandise plan: preparing the merchandise plan; information from previous year's records; anticipating the current program; weekly merchandise reports; the plan--its objectives and its effects.

3. Merchandise control and analysis: computing inventory value, retail method; meaning of gross margin; calculating turn-over rates; finding stock-sales ratio ; comparing with results obtained in similar types of businesses.

4. Kinds of inventory records: manual; manual and mechanical; punch card; cash register control; computer.

MARKET RESEARCH AND ANALYSIS

Objective

1. To show that understanding and analysing the customer is essential for an effective marketing program.

Introduction:

1. Importance of the consumer in retailing today, better understanding of the consumer, study of customer trends.

Consumer Status

1. Rapid changes in:

   (a) population--significant change in age groups and the resultant purchasing power groups; changes in family size and income; effect of working wives; mobility and residence.

   (b) economic and social change--distribution of income and expenditures; trends, spending patterns and outlook.

   (c) education--relationship between education and income; higher standard of living; more exacting and discerning customers.

Consumer Traits

1. Mass markets: development of middle income classless market; birth of "leisure" classes from increased income and reduced working time; changes in purchasing power as a result of higher incomes.

2. Age groups: today's mass market directed to babies, teens, young married people, and older folk; values of each group.

3. Occupations: effect of changing occupations on retailing; more wage earners, rise of suburbia.

4. New goals and new standards: changes in merchandise standards, build-in obsolescence, throwaways; standardization; new pace of shopping; rise of the independent purchaser.

5. Changing interests and habits: community affairs, leisure time activities; home life, family living.

Consumer Buying Motives

1. Necessity for consumer analysis.

2. Classification of motives: rational and emotional motives, primary motives--basic wants, selective and patronage motives; salesmen's knowledge of buying motives--identifying, classifying; buying motives as illustrated in advertisements.

Consumer Classification

1. Estimating the needs of the consumer--appraisal of the customer according to clothes, expression, conversation, age, size, etc.

2. Consumer behaviour patterns:

   (a) Deliberate (careful)
   (b) Decided (positive)
   (c) Undecided (just looking)
   (d) Friendly (talkative)
   (e) Unfriendly (disagreeable)
   (f) Impulsive (hurried)

Consumer Analysis

Study of past sales and customer wants--sales reports, want slips; consumer surveys--questionnaires, panels, advisory groups; consumer information--consumer reports, consumer and business organizations, Better Business Bureau; consumer of tomorrow.

LAWS AND ETHICS OF MARKETING

Objective

To study business law and ethics as they affect the marketing of goods and services.

Laws of Marketing

1. Nature of a sale of goods; other contracts distinguished from sales; classes of sale with effect on ownership of title and possession.

   (a) Absolute sales: common law; statute law--Sales of Goods Act and Statute of Frauds; rules of delivery, acceptance, and payment; ascertained or specific goods; unascertained goods; conditions and warranties--seller's title, sale by description or sample, quality or fitness of goods for use; rights and remedies of unpaid seller.

   (b) Conditional sales: nature; conditional sale contract; Conditional Sales Act--form and content of contract, buyer's right to redeem, buyer's liability for deficiency on resale, registration of the contract, information to third parties.

   (c) Bulk sales: legislation governing bulk sales.

   (d) Bills of Sale and Chattel Mortgages: bills of sale--registration; chattel mortgages--form of contract, registration of mortgage, mortgagee's remedies on default, sale by mortgagee, discharge.

2. Regulations regarding suspected theft.

3. Bailment: defined; renting personal property; working on personal property; storing goods; carriers--examples of private and common carriers, liability with limitations.

4. Other Legal Regulations: brief treatment of The Food and Drug Act, weights and measures laws, local laws--police, fire, licenses.

Ethics of Marketing

Ethics defined: honesty, integrity, service; code of ethics developed from local groups--companies, associations, Chamber of Commerce or Board of Trade; Canadian Code of Advertising Standards; enforcement of a code; discipline; Better Business Bureau; Fair Trade Code for Advertising and Selling of the National Association of Better Business Bureaus, Inc.

CREDIT AND COLLECTION

Credit

1. Nature: origin, historical aspects, concept and use of credit.

2. Wholesale and retail credit: advantages and disadvantages; charge accounts, instalment credit, down payment, revolving credit, credit cards, charge-plate system.

3. Credit data on customers: bank and credit references; credit agencies; other creditors; past credit record.

4. Investigating the risk: character, income, capital, residence, employment, debtor psychology, property.

5. Reporting agencies: Dun & Bradstreet; trade references; local credit bureau; banks.

6. Credit procedure: interviewing, authorizing, billing, collecting.

7. Credit records: application forms; accounting systems--machine, punch card, computer.

8. Detecting weak customers: aging accounts, line of credit, overdue accounts, bad debts, use of cash discounts, customer ordering procedure, customer list.

9. Legislation: Statute of Limitations; Conditional Sales Act; Small Loans' Act; sales finance and consumer finance companies.

Collection

1. Reasons for prompt collection.

2. Collection procedure: invoicing, monthly statement, telephone, correspondence, drafts, collection agencies, legal action.

3. Vocabulary: form or collection letters, cycle billing, statement inserts, repossessions, skip tracing, garnishment, sheriff's execution, attachment, bankruptcy.

CAREERS IN MARKETING

Objectives

1. To help a student become gainfully employed.

2. To help a student have a positive and successful initial work experience.

3. To help the student maintain continuing employment.

4. To orient students toward continuing education.

Work Experience

Practical experience is an essential part of the student's work in the marketing program. The teacher should discuss with students the full implications, opportunities and responsibilities of work experience.

Initial Duties and Responsibilities

General attitude toward work: building the bridge between the school and employment; emphasizing the need for patience; teaching the student to adapt to a new rating system; teaching students how to recognize a compliment or a rebuke; analysis to recognize the inherent requirements of a job; adjusting to irritation and frustration; recognition of opportunities for initiative; maintenance and improvement of one's own standards of work, recognition of the variety of acceptable standards of work; necessity for long-term philosophy of employment; encouragement of students to return to school for discussion and exchange of ideas.

Personnel Problems

Study of company employee manuals; company organization and administration; employee association benefits and policies; unions and their policies; fringe benefits; pensions; job evaluation; performance reviews; incentives and work standards; promotion policies; methods of payment, overtime; living and housing allowances; tax problems.

Brief outline of major social benefits in Canada: unemployment insurance; health and hospital insurance; workmen's compensation; vacation with pay; minimum wages; family allowances; old age pensions; relationship of social benefits to taxation.

Continuing education: testing and its uses; educational programs available through company sponsorship; general training programs; basic educational requirements; night school classes; correspondence study; short courses; diploma courses; refresher courses; extra-mural study for advanced degrees; certificate courses; trade and technical courses; company policy regarding payment of tuition; relationship between educational background and promotion.

Adjustment to promotion: new responsibilities; change of status and its effect within company; acceptance of greater community responsibility; change in living standards.

Locating Employment

Student leads; leads from staff and school administration; service clubs and societies of all kinds; parents and those interested in school affairs; local business; National Employment Service; private employment agencies; newspaper and periodical advertising; alumni; "cold" canvassing; personal advertising; school functions which show student talent; visits to offices and plants; relationship of part-time work and work experience programs to full-time employment; general reputation of the school and course.

PART III

EVOLUTION OF MARKETING

Objective

To develop an appreciation and awareness of the important part Marketing has played in the development of our present society.

1. Sailors and Sellers
   Cretans, Phoenicians, Ionian Greeks, Rhodians, Corinthians, Carthaginians.

2. The Sword and the Ploughshare

   Rome: borrowing funds for war; manufacture of arms and supplies; transportation of legions; purchase of booty by following the armies; development of auctioneering system, wholesale lots; collection of war reparations; the state-given contracting system for taxes, mining, coinage, building; expansion of the luxury trades: spices, gems, grain, oil; hunger for gold; supremacy in finance.

   Alexandria: supremacy in commerce; trade with the East--pearls, coral, silk, pepper; trade with the West--wine, tin, grain, amber; importance of Alexandria to Rome; role of Alexandrian traders in spread of civilization--colonies in India, postal service, papyrus letters, Jewish calendar, Roman law, Babylonian astronomy, Greek music, theatre, weights and measures, talented slaves, medicine, textile designs; role as accumulator of knowledge--maritime law, bookkeeping, banking.

   Rome vs. Alexandria: Roman dislike of wealth paid for Eastern luxuries; drain on resources of the Empire; Alexandrian hatred of Roman taxes; draining of business fortunes to the land; "fall" of Rome.

3. The Moneychanger and the Temple

   Rise of Islam: Moslem religion; diffusion of Arabic language; development of mathematics, science, medicine, law, architecture; use of tile, veneer, ivory inlay; weaving of rugs and fine fabrics.

   Effects of Christianity on business: shaping of Christianity by Jewish and Christian teachers; appeal of Christianity to handcraftsmen; role of Christian brotherhoods holding property in trust for the poor; church and usury; problems occurring when

Christianity became official faith of the Roman Empire--take-over of pagan temples, properties, and their businesses (banking, paper-making); role of the missionary and the merchant; tithing; struggle over income and inheritance; effects of the Protestant Reformation on traders and bankers.

4. The Discovery of the East

Marco Polo: adventures in China and description of places, customs, and history of the Mongols; importance of his writings as a source of Western information about the East.

5. The Medieval Centres of Business in Europe

Lubeck: Head of the Hanseatic League; formation of the business brotherhood; control of the exchange of goods; excellence of merchandise; grading and supervising of goods and control of prices; putting-out system; struggle for standardized coinage; role of individual merchant; conflict of individual interests and those of the community; development of explosives; decline of the League.

Venice: Venetian love of glitter; trade with the East; manufacture of glass; tolerance in religion; trading friendships with the Infidel; compulsory registration for taxes; decline of Venice.

Florence: machinery and technological change; separation of personal expenses from accounts of business; tariff barriers; fight for the wool trade; rise and fall of the Medici financial empire; cultural influence of the Medici on rest of Europe.

6. The Sixteenth Century Masters of Merchandising

Jacob Fugger: German merchant financier; role of monopoly; lending of sums to Emperor Maximilian I, Charles V; patron of arts, coining own money.

Thomas Gresham: English merchant and financier; founding of the Royal Exchange; "Gresham's Law"; role as an Elizabethan diplomat and merchant.

Jacques Coeur: French textile merchant and financier; exporter of goods to near East; reforms in finance.

7. Seventeenth Century Colonialism

Amsterdam and the Dutch Trader: rule of Holland by traders, "sea-beggars"; rise of business oligarchies; control of politics by business; wars for economic monopolies; role of universal middleman; ownership and building of fleets; demand of trading rights in the Baltic, Rhine, Mediterranean, Adriatic; carrying monopolies in England and Russia; purchase of Manhattan; founding of the Bank of Amsterdam--for transfer of funds, changing coins, use of receipt for deposited coins, development of promissory note; founding of Amsterdam exchange--for transactions in products,

speculation in pepper and whale-oil; its transformation into international money-lender; decline of Holland; proclamation of the Republic.

8. Eighteenth Century Mercantilism

East India Company:

(a) British - exporting of textiles to East Indian trade; acquiring territory for military bases and intervention in Indian politics; loss of monopoly.

(b) Dutch - winning of trade of Indonesia, Ceylon, and Malaya from British and Portuguese; colonization of Cape of Good Hope; spice trade; payment of dividends for 200 years.

(c) French - competition with the English for trade of India; defeat by British.

Boston Tea Party: British retention of tea tax to tax colonies and give financial aid to East India Company; American colonists' struggle in Boston Harbour; results.

9. Makers and Merchants in Nineteenth Century England:

Pickles, soaps, jams, textiles; the commercial traveller; use of illustrated catalogues; samples; rise of the wholesaler and manufacturers' agent, introduction of brand names, advertising, glass display windows, fancy goods shops, large quantity purchasing; bonded warehouses; import trade in sugar, tea, tobacco, foodstuffs, wheat, wool, cotton, export of machinery, steam engines, pottery, coal; "workshop of the world"; decline in agriculture, and industrial prominence; World War I and its effect on trade; rise of socialism and the "planned economy".

10. Early Canadian Highlights

Hudson's Bay Company; development of early trading units in Quebec; Northwest Fur Company; Intercolonial trade after the American Revolution.

11. Canadian Entrepreneurs: their role in the development of our commerce

The following list of Canadians represents some names of men prominent in the development of well-known firms. There are many others, and the teacher should extend the choice to illustrate the local development of marketing and merchandising.

James McGill	Joseph E. Atkinson
Henry Birks	Sir William James Gage
Price Brothers	T. P. Loblaw

Sir Herbert Holt	Willard Gordon Weston
Lord Strathcona	Steinberg Brothers
Sir William Van Horne	Donald Gordon
Sir James Dunn	Charles A. Dyson
Timothy Eaton	John David Eaton
C. L. Burton	C. D. Howe
Henry Morgan	G. Tamblyn
C. Gordon Cockshutt	

12. Modern Marketing Trends

Study of changing marketing conditions: product changes, changes in business procedures and strategy; emphasis on the sale of service rather than product, providing sales and product information; data processing, automatic ordering and inventory control; buying committees - a growing trend in large scale purchasing; significant changes in sales techniques, advertising and display; the development of the suburban shopping plaza, the discount store, the supermarket, automated selling; study of the firms involved; the place of the smaller business in the modern economy.

ILLUSTRATION, COLOUR, AND DESIGN

Objectives

1. To give an understanding of the basic principles of colour and design.
2. To develop a personal appreciation of colour use and design harmony.
3. To study the psychology of illustration, colour,and design from effective advertisements.

Illustration

1. Functions of illustration in printed advertising.
2. Pictures with appeal.
3. Photographs versus drawings.
4. Art techniques.

Colour Dynamics

1. Psychological suggestions of colours: uses of colour; media and colour.

2. Factors in colour selection.

3. Principles of colour usage: dimensions of colour; the colour scale; harmonious colour uses; colour legibility; complementary combinations.

4. Increasing use of colour: magazines, newspapers, movies, television.

Design

Principles of design: exploration; elementary facts and rules; creating a style--harmony, proportion, balance; design application--architecture, interior, costume, decorative; application of colour and design on the store appearance and on the sale of merchandise; the effect of colour and design on the saleman and the consumer.

Materials

Application of colour and design to fabrics, leather, glass, wood, metal, plastic, rubber, masonry--natural and manufactured materials.

PART IV

TRAFFIC, SHIPPING, TRANSPORTATION

Transportation in the Scheme of Things

1. Importance to the economy and organization of a country, its people and commercial life.

2. The components that make up a country's transportation system: railways--trans-continental, provincial, private, others; trucks--common carrier, contract, private, package freight, bulk; boats--deep sea, domestic, coastal, inter-water, St. Lawrence River, Great Lakes, others; airline--common carrier, charter, private; pipelines--common carrier, private.

Buyers of Transportation

Industrial and commercial companies; forwarders--those who assemble shipments for the general public and consolidate them for delivery to the destination for a fixed service charge; pool car operators--similar to forwarders, but do not assemble or consolidate; others.

Carrier Operations

1. Physical handling of goods and services.

2. Contracts of carriage in transportation system--documents required in movement of goods, persons or property.

3. Insurance of goods in storage and in transit.

Legislation

Rules and regulations under which a transportation system functions--railway, highway transportation, water transportation, air transportation, pipelines.

The Pricing of Transportation Services

1. General rate structure: railways, trucks, ships, airlines, pipelines.

2. Tariffs: rate tariffs, rules and regulations, accessorial services.

3. Customs and clearing through Customs: brokers, customs houses, shipments in bond, government regulations.

Terms of Sale

Interpretation and scope; relationship to purchasing, selling and transportation.

Careers in Transportation

Carrier field, industrial field, consultant field, association field.

MATERIAL HANDLING, FLOW AND STORAGE

Objective

1. To study this important area of the distribution and marketing process.

Aims of Material Handling

1. Reducing costs through efficiency.

2. Space utilization; minimum handling; shorter process time cycle; larger unit loads; reduce waste; increased productive capacity; improved working conditions; improved distribution.

Evolution of Material Handling

1. Man as a load-carrier in early times, in Egypt and to the present day.

2. Animals as carriers: beasts of burden--camels, mules, oxen, donkeys, horses; other animals used as carriers--elephants, water buffalo, llamas, dogs, reindeer; use of these animals today.

3. Early mechanical carriers: sledge--originally log with thongs, stoneboat; invention of wheel--tree trunks as rollers, ancient Egyptian wheel, Egyptian chariot, cart, wagon.

4. By boat: log, raft, dugout; boats made of grass, bark, skin, or boards; Phoenician boats; waterways in the Middle Ages; invention of Mariner's Compass, role of sailing ship in Age of Discovery; types of sailing ships--bark, brigantine, schooner, clipper; introduction of steam navigation; types of boats today--cargo, tramp, oil tanker, refrigeration ship, dredger, ice-breaker, tug, steam trawler and drifter, whaler; influence of canals--from Egypt in 500-600 B.C. to the present.

5. By road: Roman roads united Empire into economic unit; highways in the Middle Ages; turnpike trusts; macadam; stagecoach, automobile with gasoline engine in 1890 leading to the diesel truck and the superhighway; importance of road transportation today.

6. By rail: provision of track--wood, steel; application of steam traction; the railroad era; types of freight cars--box, cattle, tanker, gondola, refrigeration, caboose; steam, electric, and diesel power.

7. By air: development of the airplane; its use today.

8. Contributors: application of mechanical handling in production of chinaware by Josiah Wedgewood; introduction of interchangeable manufacturing by Eli Whitney; introduction of progressive assembly line by Henry Ford; impetus to mass production by World War I; automation of mechanical equipment sparked by World War II.

Careers Available in Material Handling

Material Handling Engineer; Industrial Engineer (Methods and Time Study); Warehouse Manager; Freight Supervisor; Stockroom Supervisor; Shipping Room Supervisor; Receiving Room Supervisor; Time and Motion Study Observer.

Employment opportunities in: Research; Market Research; Methods Research; Material Handling; Inventory Control; Data Processing.

Material Handling

1. General Principles: handle as many pieces in one unit as is practicable; design handling aids for large, heavy, or bulky objects; move the greatest weight or bulk the least distance; eliminate unnecessary handling by means of proper planning, scheduling, and dispatching; study of material handling problems in relationship to physical and facility layout, efficiency and costs.

2. Principles of Material Flow: providing for movement of material as directly as possible through the plant; using direct mechanical routes whenever practicable; planning machine-controlled material movement to assure constant flow; applying the "line" production principle; delivering incoming material directly to storage areas; allowing for a bank or float of material between operations to permit uninterrupted flow when production is intermittent; making use of gravity; combining operations to eliminate handling; grouping related activities and departments; planning to process heavy or bulky material near receiving area; considering probability of future expansion or contraction of production activity.

3. Methods: Planning for straight line moves; combining inspection, storage, and assembling in relation to material flow; reducing distances on all moves; analysing handling for improvement by elimination, combination, or simplification; avoiding unnecessary transfer of material--use of a container, skid, or pallet; delivering material to the right place on the first move.

4. Utilization of Manpower: use and methods of manual handling; use and methods of mechanical handling; study of combinations and improvements; safety factors.

5. Receiving, Shipping, and Storage: using mechanical devices; care in loading and unloading; planning minimum pick-up and delivery points; providing means for levelling truck and dock heights; delivering material directly to point of use; planning storage facilities for easy accessibility; uniform containers--aid in counting; material storage control--rapid turnover, minimum volume; making full use of building cube to obtain maximum storage at lowest cost.

6. Containers and Unit Loads: use of containers for consolidating material handled in unit loads; designing containers for use in shipping, receiving, in-plant handling and at the point of use--weight, standardization, number; use of collapsible containers to save storage space when empty and to reduce return transportation cost; use of the product, package, or container as a pallet; use of expendable pallets or containers to eliminate return transportation cost; use of pallets to permit packages of lower strength; requiring supplier to ship in unit containers for direct

delivery to point of use, or for ease of handling; using material directly from the vendor's container; designing container to permit automatic handling, to provide the necessary protection, to restrict movement, minimum ratio of dead weight to pay load; obtaining economy by increasing the size of the handling unit; prompt assembling of materials and retaining of materials in unit loads.

7. Equipment: use of equipment to save space, time, and to provide flexibility in loading, unloading and storing; full utilization of present equipment; advantages of standard equipment; providing for breakdowns.

8. Cost: relationship of unit handling cost to number of pieces handled at one time, to distance, to weight, and to equipment investment.

Storage

1. Principles of Good Storage: maximum use of space; effective use of time, labour and equipment; accessibility of all items; rapid, easy movement of supplies, positive item identification; maximum protection of supplies; clear aisles and floors; neat and orderly appearance.

2. Related Areas and Activity: receiving, storage, order picking, order assembly, packing, loading, shipping, office.

3. Factors for Consideration: similarity of items; popularity of items; physical characteristics of material: hazard, value, durability, perishability, size, weight, shape, bulk, quantity; physical characteristics of the facilities: floors, doors, aisles, height, elevators, lights, column spacing.

MARKETING

Five-Year Programs

This course is suggested as a one-year Senior Business Option for Five-Year Program students. A year's work should consist of Part A and as many topics of Part B as time permits. A minimum of four or five periods a week will be required. Student interest and teacher aptitude will be factors in determining the amount of time given to each topic. For more detail, teachers will find it helpful to refer to the related sections, where applicable, of the Four-Year Courses.

Objectives

1. To enable the student to obtain a broad insight and understanding of the operation of our system of distribution.

2. To study the major marketing activities.

PART A

Introduction

Definition of Marketing; types of marketing activities; origins, growth, and present day role.

Channels of Distribution

Familiar Forms of Organization: From producer to manufacturer, to wholesaler, to retailer, to consumer; new classifications caused by constant changes in distribution procedures and changes in types of ownership: wholesaler or jobber, broker, manufacturer's agent, wholesale auctioneer, commission merchant, drop shipper, independent retail store, single-line or neighbourhood store, variety store, side-line store, direct retail, automatic vending, specialty shop, corporate chain store, chain of leased departments, mail-order house, consumers' co-operative, closed-door discount house, open-door discount house, supermarket, plaza shopping centre.

Selecting a Channel of Distribution: consumer or industrial distribution - nature,size, location; type of product; purchasing and trade practices.

Retailing

Introduction: development; types of retail organizations.

Aspects of Operation: receiving, marking and displaying the merchandise; inventory procedures, stock rotation, inventory control, mark-up, mark-down, ordering and pricing.

Retail Management: function, organization, economic performance, responsibilities of key personnel.

Customer Services: credit, delivery, parking, telephone orders; adjustments and refunds; modern developments; importance of public relations.

Wholesaling

Introduction: development and function; types of wholesale organizations; recent trends.

Operation: importance of the selling function; storage; delivery; inventory considerations.

Industrial Marketing

Industrial goods defined; the scope of the industrial market; methods of operation within this market; responsibilities of key personnel.

Marketing in the Service Industries

Insurance, stocks, advertising; types of service; problems of marketing intangibles.

The Techniques of Buying

Selecting suitable merchandise - determining requirements, price, timing; organizing and classifying the merchandise - assortment planning, item merchandising, price lining; pricing merchandise for sale - mark-up, mark-down, building a balanced business.

Salesmanship

Role and function of a salesman - his status and remuneration; the sales personality - factors, importance, development; human relations in selling; types of selling - manufacturer, wholesaler, retailer, specialty; basic selling techniques - product knowledge, locating customers, the approach, sales presentation, meeting objections, closing, increasing the sale.

Advertising and Sales Promotion

Function of advertising; the advertising agency - function and organization; advertising media - special characteristics of newspapers, magazines, radio, television, and others; selection and evaluation of various media; preparation and testing of advertisements.

Sales Promotion: purpose, development, factors of influence; types and practices.

Market Analysis and Research

Purpose; techniques and methods; sources of information; buying motives; buying trends; consumer analyses.

Product development: establishing demand, planning production, design, package, label, brand, price, service.

Functions of Marketing Management

Planning and policy making; co-ordination with other departments; organization and operation; nature and purposes of control; budget; costs.

PART B

Storage and Material Handling

Purpose and objective; principles of good storage; factors to consider in storage activities; principles of material handling.

Transportation

Importance; types and organization; services and costs; legislation and regulations.

Financing, Credit, Insurance

Sources of capital; working capital; effects of merchandise turnover; budgeting and control; internal financial organizations; types of credit; granting credit; collection procedure; insurance.

Legislative and Other Regulations

Laws and regulations--local, provincial, federal, international; policing agencies; taxes--local, provincial, federal.

Canada's International Trade

Canadian export trade: importance of export trade to Canadian economy; export permits; restrictions on strategic materials and on exports to certain countries; import trade--Canadian customs regulations; tariffs; short room procedure; long room procedure; drawbacks.

RETAIL MERCHANDISING

Two-Year Program

It is intended that Part I will be offered in Grade 9 and Part II in Grade 10, each requiring a year of instruction with a minimum of five periods a week. Part I is not a prerequisite for taking Part II. In schools where the subject is offered only in Grade 10, all or some of Parts I and II may be covered, depending upon the time available.

Objectives

1. To give students a knowledge of the basic facts of merchandising.

2. To improve and develop the student's ability in oral communication and in making rapid, accurate calculations.

3. To interest students in a career in merchandising.

4. To develop those qualities of personality and conduct required for success in retailing.

5. To give students practical experience in retailing through part-time employment, a work experience program, or simulated work experience in the Merchandising classroom.

6. To help students to make a wise selection of the goods and services now available to them.

NOTE: Student activity and involvement must be recognized as essential to the successful teaching of this course.

The subject is taught best in a situation where suitable equipment is available. At this level, emphasis may be placed on the mechanical skills, such as cashiering, bagging, gift wrapping, store and window display, weighing, and pricing. The development of skill in oral communication, and rapid, accurate calculation should be stressed throughout the entire course.

PART I

Introduction

1. The importance of retail merchandising in the community.

2. Retail Merchandising as a career:

    (a) population growth
    (b) increasing wage levels
    (c) reduced work week
    (d) qualifications required

Kinds of Retail Establishments

1. Determined by products sold:

    (a) department store
    (b) discount store
    (c) supermarket
    (d) variety store
    (e) specialty store

2. Determined by organization:

    (a) independent
    (b) corporate chain
    (c) voluntary chain
    (d) co-operative

3. Determined by ownership:

    (a) sole proprietorship
    (b) partnership
    (c) limited company

Preparation of Goods for Sale

1. Receiving the goods:

    (a) inspection and checking for correct number of pieces
    (b) forms used--receiving voucher, driver's receipt

2. Checking the order:

    (a) methods--blind, open, spot
    (b) forms used--packing slip, invoice, purchase order, dummy forms, error slips

3. Marking the goods:

    (a) determining selling price
    (b) kinds of price tickets
    (c) information on tickets
    (d) pricing equipment and price charts
    (e) correcting errors
    (f) changing prices

4. Records required:

   (a) perpetual inventory cards
   (b) requisition forms
   (c) damage reports
   (d) material withdrawal slips
   (e) physical inventory forms

5. Reserve stock:

   (a) location of reserve stock area
   (b) arrangement of goods
   (c) rotation of stock
   (d) updating bin cards

Development of Personal Qualities Essential to Success

1. Appearance and grooming
2. Good manners
3. Dependability
4. Honesty
5. Loyalty
6. Tact
7. Initiative
8. Enthusiasm

Development of Personal Skills Essential to Success

1. Oral communication, including telephone usage
2. Written communication, including memos, phone messages
3. Accurate calculation
4. Legible penmanship

Selling the Goods

1. Knowing the merchandise from consumer and sale viewpoints:

   (a) importance
   (b) uses of the product
   (c) manufacturing methods
   (d) performance and quality
   (e) instructions for use
   (f) competitive products
   (g) care, service and guarantee
   (h) sources of product information

2. Steps in the sale:

   (a) approach
   (b) determining the customer's wants
   (c) presenting the goods

(d) answering objections
(e) closing the sale
(f) increasing the sale
(g) proper leave-taking and courtesy

3. Operating a cash register:

(a) the keyboard
(b) the change fund
(c) ringing up the sale
(d) calling the total
(e) collecting the cash
(f) making change
(g) changing the tape

4. Controlling a cash register:

(a) refund, error, pickup, change and balancing procedure
(b) changing date and recording corrections

5. Recording the sale:

(a) the sales tally
(b) charge, C.O.D., and instalment sales
(c) credit and cheque authorizations

6. Returned goods procedure:

(a) retention of goodwill
(b) inspection
(c) exchange or refund

7. Inventory control:

(a) stocking the shelves
(b) stock-taking procedure

8. Responsibility for store appearance:

(a) clear aisles
(b) tidy floor area
(c) neat displays
(d) clean equipment

Preparing the Goods for the Customer

1. Cash and carry
2. General wrapping procedures
3. Gift wrapping procedures
4. Delivery procedures

Requirements and Opportunities for Employment

PART II

Introduction

1. Discuss the variety of retailing problems which exist beyond the actual selling of the goods to a customer.

2. Career opportunities.

3. Review of personal qualities and skills essential to success.

Display Work

1. Types of display
2. Selection of goods
3. Locating the display
4. Size of display
5. Form and colour of display
6. Evaluation
7. Special displays
8. Elementary sign writing

Advertising

1. Selection of goods
2. Choice of media
3. Writing the copy
4. Composition of advertisements
5. Determining size of advertisement
6. Length of advertising period
7. Measuring effectiveness of advertisement

Sales Promotion

1. Store demonstrations by suppliers
2. Contests
3. Children's attractions
4. Special sales
5. Trading stamps

Ordering the Goods

1. Selection of suppliers
2. Quantities to order
3. Timing the deliveries to the store
4. Care in completing purchase orders
5. Terms of purchase orders

Selling the Goods

Complete review of selling procedures (See Part I, Page 33)

Building Customer Goodwill

1. Through efficiency and honesty.

2. Through customer service, free parking, shopping baskets and buggies, credit sales, delivery service, refunds, night openings, pick-up services, store cafeteria, rest room lounges.

Ethics in Selling

1. Providing truthful information
2. Overcharging - correction procedures
3. Defective products
4. False advertising and labelling
5. Ethical treatment of competitors

Store Location

1. Economics of the community
2. Traffic flow
3. Competition

Store Layout and Organization

1. Basic principles
2. Methods of improving
3. Chain of command

Maintaining and Policing the Store

1. Good housekeeping practices
2. Store security

The Law and the Store

1. Municipal regulations
2. Collecting taxes - Federal and Provincial
3. Insurance
4. Protection of customers and employees
5. Policing agencies

Financing a Store

1. Need for available cash
2. Sources from which to borrow
3. Collection of overdue accounts
4. Maintaining a high merchandise turnover

Store Records

1. Sales
2. Refunds
3. Shortages
4. Markdowns and markups
5. Payroll
6. Personnel
7. Damages
8. Inventories

Employee Selection

1. The application form--personal data sheet
2. Testing of applicants
3. The interview

Training of New Employees

1. In schools
2. On the job--by other employees
3. Absenteeism or lateness
4. Unsatisfactory work

Finding a Retailing Job

1. Where to look
2. What to do

FACILITIES AND EQUIPMENT

SPECIAL CLASSROOM FOR INSTRUCTION AND PRACTICE IN MARKETING

Size

It is recommended that approximately 900 square feet of floor space be provided for the classroom and approximately 600 square feet for an adjacent laboratory workroom.

Schools making provision for facilities by remodelling existing rooms, may, of necessity, fulfil the requirements with a somewhat smaller classroom and a supply or preparation room of 300 to 400 square feet in lieu of the laboratory workroom. An alternate possibility is the use of an over-size classroom with perimeter work stations.

Facilities

1. Built-in shelving and display cases

2. Walk-in display window area without glass; platform floor raised one to two feet above the floor; complete with ceiling lighting fixtures, grill for hanging displays, and floor duplex outlets for spotlights.

3. Built-in display counter (glass top and front) complete with sliding doors at rear of display area and stock drawers below display area. This counter should be supplied with duplex electrical outlets and fluorescent light fixtures.

4. Work counter (arborite covered) with shelves below and above, along one wall of preparation room.

5. Full-length mirror.

6. Storage chest for clothes racks or large display materials along one wall.

7. Cork notice board at least 16 feet in length.

8. Sink of regulation size.

Furniture and Fixtures

1. Tables - trapezoid shape, surface area approximately ten square feet.

2. Chairs - light-weight, metal frame, with plywood or synthetic seats and backs.

3. Two filing cabinets - legal size.

4. Hanging frames and folders for filing cabinets.

5. Wrapping counter - five to six feet in length with linoleum or arborite top, complete with wrapping paper holders under counter. This counter to be made movable by addition of casters which can be locked.

6. Magazine rack - library type to be used for display of students' projects. It should be at least five feet high, built in, if desired.

7. Lectern - portable.

8. Shadow boxes - for display purposes, complete with felt, cork, or burlap backing.

9. Display tables - about six feet long by 2½ to 3 feet wide, one or two of these depending on the size of the classroom and on the type of program.

10. Flannel board.

11. Tack board--cork, to fit on separate easel, approximately 4 by 4 feet.

Equipment

1. Electric adding machine or printing calculator.

2. Electric cash registers with department classifications and tax key.

3. Two-way telephone with 50 feet of cord.

4. Tape recorder with conference speaker and equipped to record telephone conversations.

5. Tape moisteners.

6. Paper cutter--to take 18 by 18 inch paper.

*7. Typewriter.

8. Camera--35 mm. with tripod and flash unit attachment.

9. Staplers--large size.

10. Overhead projector.

*11. Opaque projector complete with stand on casters.

12. Mobile projection stand.

*13. Sound movie projector--16 mm.

*14. Record player--three-speed.

15. Film strip and slide projector.

16. Screen mounted on front wall of room. It should be mounted so that it can be tilted to position for overhead and regular projectors.

*17. Dry photocopier.

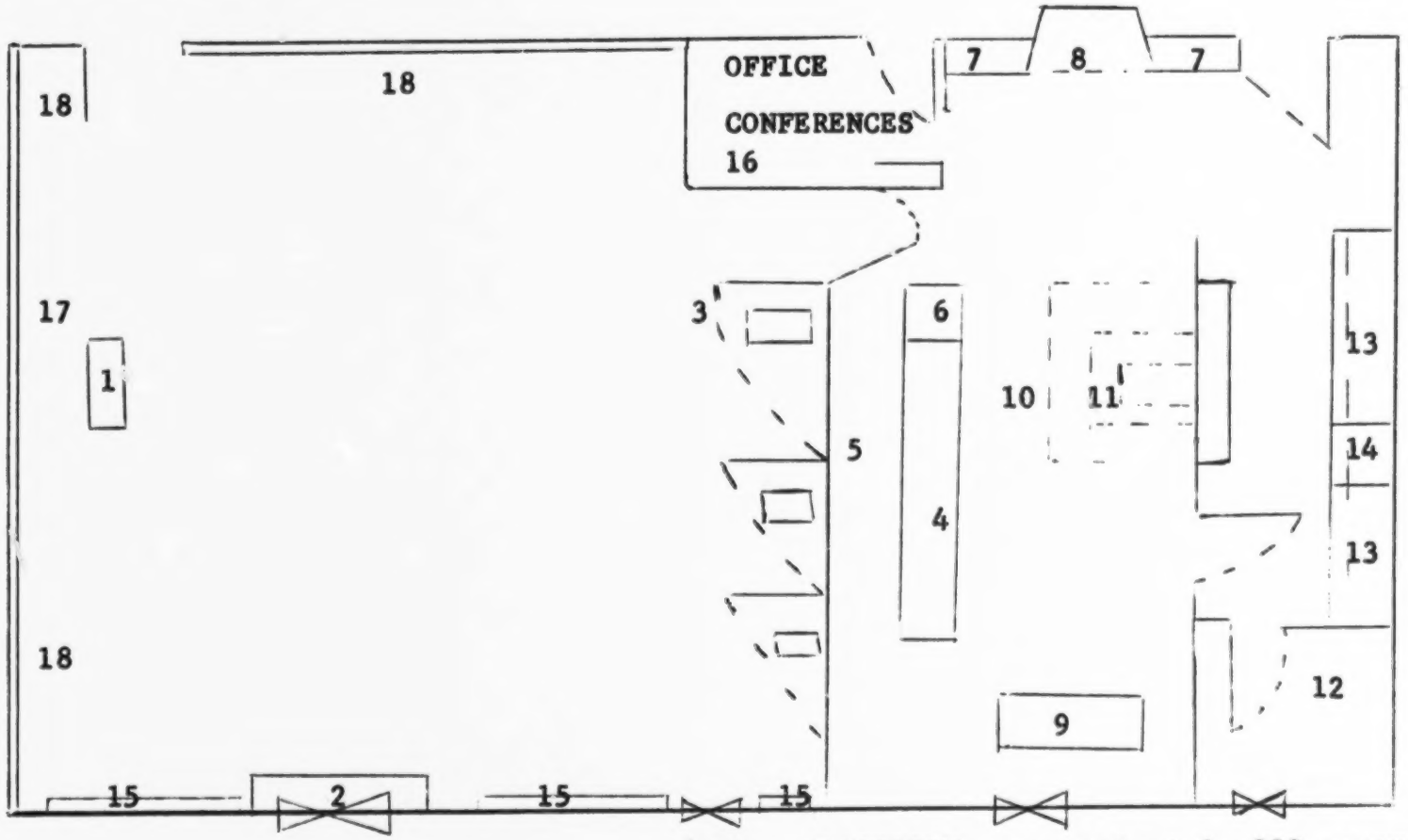
18. Movable spot lights.

19. Display equipment--stands, forms, risers.

20. Step ladder.

N.B. The items marked with an asterisk do not need to be kept in this special classroom, but should be readily available for use in this course.

A Recommended Plan - (30' width)

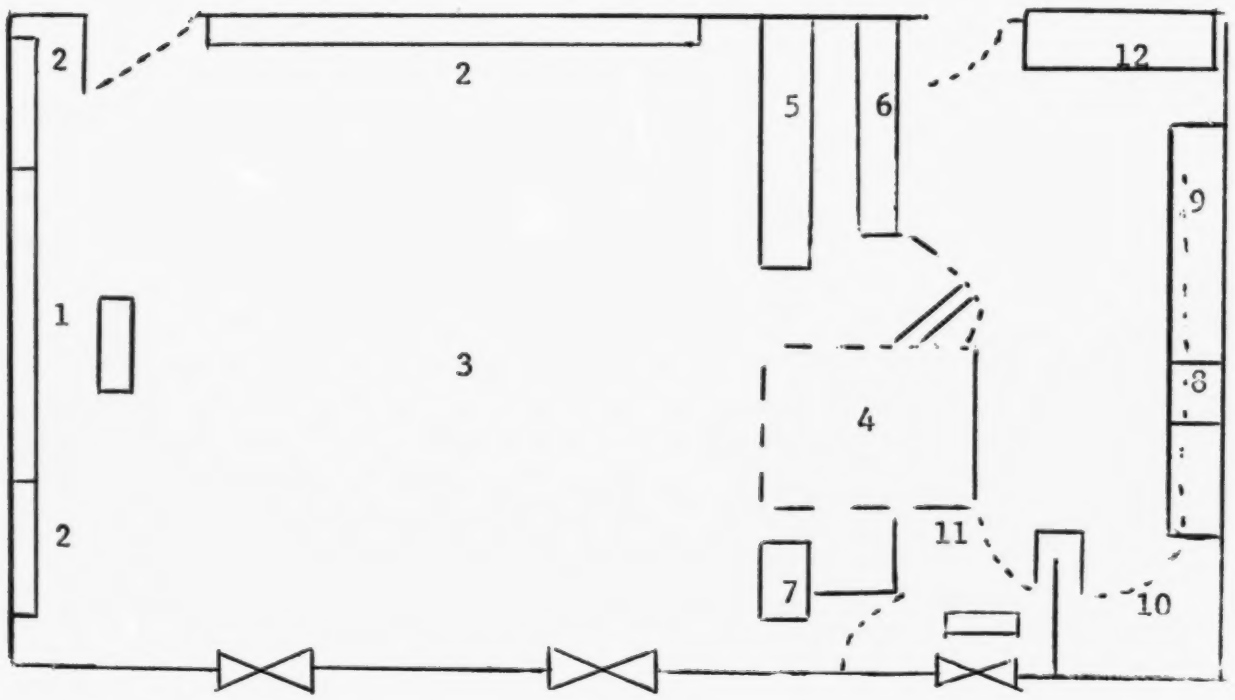


AREA - CLASSROOM - approximately 900 square feet
LABORATORY WORKROOM - approximately 650 square feet

EQUIPMENT LIST

1. Teacher's demonstration desk
2. Heat convector
3. Folding partitions - can be closed to form tackboard - open to form private work areas
4. Glass top and front sales counter
5. Glass-front cupboard over
6. Wrapping desk - recessed end for cash register
7. Storage cupboards
8. Display window - opening on hall - revolving pegboard -tackboard back
9. Work table
10. Display window - corner posts - no glass-floor of window - 12" from floor
11. Movable platforms
12. Clothes cupboard
13. Work counter - cupboard under and over
14. Stainless steel sink, cupboard over
15. Book shelves
16. Office - glass partitions
17. Chalkboard - screen over
18. Tackboard - burlap - pegboard

Suggested Minimum Facilites (adaptable for converting existing classrooms).



Area - Classroom	Approximately	800 square feet
- Work Room with cupboards Office, etc.	"	400 " "

1. Blackboard, screen over
2. Tackboard
3. Trapezoid tables
4. Display window - no glass - corner posts - rear entrance
5. Glass top and front display - sales-counter
6. Glass front cabinets
7. Wrapping counter and cash register
8. Stainless steel sink
9. Cupboards - over and under - work counter
10. Clothes cupboard
11. Office - conference room - glass partitions
12. Display window - opening on hall

SUGGESTED PROCEDURES FOR TEACHING MARKETING

PART A

The following are general teaching suggestions which may be of assistance in teaching Marketing. A judicious use of these suggestions should assist the teacher to present his course in such a way that interest, variety, and motivation are maintained.

As soon as possible, the teacher should work out a series of study outlines covering each topic of the course. The outlines may include the main points of lesson, key questions, references to texts and magazines, and a suggested list of individual and group projects. These projects may deal with a variety of matters such as sales demonstrations, product analyses, rating of brands, assessment of advertisements, study of consumer services.

Many areas of the Marketing course lend themselves to the use of the case study method. The principles so developed may then be applied to additional cases.

The students should keep and organize a notebook containing a record of their reports and marketing material. Each student should be encouraged to specialize in areas of his particular interest.

The teacher should delegate responsibility to students wherever possible, assign projects to individuals or committees of students, make all committees responsible for reporting to the class orally, and by distributing a duplicated précis to the class. Students should plan their work in groups. A sufficient number of students should be assigned to a group to handle a particular project. Groups may break up into sub-committees for intensive research and specialization. Parts of the course lend themselves to panel discussions. Student committees should gather and file pictures and reports on subject areas.

The bulletin board and blackboard should be used extensively. Special items may be gathered and displayed by the students. They may collect relevant pictures, graphs, articles and charts from magazines and newspapers. Students should be encouraged to build a classified file of clippings as reference material for the classroom.

Marketing students can be involved in those aspects of school activities which relate to the course-- magazine sales, ticket sales and other school promotional activities.

The resources of the community should be fully utilized for field trips, speakers, contests and awards.

Work Experience Programs

Definition; types of programs; advantages and disadvantages of such programs; problems of setting up these programs; design of records; method of placement; standards for placement; school follow-up; liaison with employer; maintenance of academic and course work; problems with school administration; problems with employer administration; problems with union administration; choice and procedures in placement; hours of work; day-release; legal problems with minors; factors of motivation; evaluation of programs; influence of similar programs in one or more of the following countries: England, Germany, United States, Denmark, and Russia.

PART B

Student activity and involvement must be recognized as essential to the successful teaching of this course.

Organization and Operation

Develop organization charts for different types of stores. Prepare, discuss, and analyse the layout and equipment for a particular store. Analyse locations of various stores and businesses in the community. Select certain stores in the community and discuss the advantages and disadvantages of their location. Discuss where new retailers should open a particular store. Use graphs for visual presentation of organization problems.

Personality Development

Discuss good grooming. List favourable or unfavourable personal traits. Draw up a code governing standards for working habits. Invite an expert on grooming to speak to the class. Set up a personality rating sheet for salesmen. Rate salesmen during an actual purchase. Use a tape recorder to correct speech habits. Teach personality development throughout the entire course. Encourage Business Dress Days.

Merchandise Knowledge

Use actual merchandise. Visit a local plant to see how the product is made. Test fibres and fabrics in class. Use mail order catalogues for comparison of products. Ask local merchants to talk about fabrics. Prepare a merchandise manual; present it to the class for critical appraisal.

Salesmanship

In teaching the development of personality and salesmanship, particular emphasis should be placed on oral work. Salesmanship is basically the art of effective communication and the student must become familiar with the oral use of the various techniques. Arrangements should be made to have students sell a particular product line for a specific time, for example, school sweaters. Convenience goods such as school pins do not usually develop the marketing concept in students.

Practise customer approach, opening statements,and meeting customer objections. Expand sales vocabulary-- list phrases and sentences that sell; list reasons why people buy. Use sales demonstrations, sales analysis charts, and invite speakers.

Compile a Product Presentation Manual in which the amount of product knowledge gathered and edited by the student would not exceed that which a successful and conscientious salesman would have at his disposal. The purpose of this manual is to have the student assemble product information that he will use. The object is to have the student deliver a complete sales presentation at some point during the school year with the manual as a formal, written outline.

Advertising and Sales Promotion

The following activities are recommended: an advertising layout contest, developing advertising slogans, collecting and analysing advertisements, drawing up attention-demanding headlines, planning advertisements for particular products, analysing the factors students like and dislike about advertisements, constructing advertising layouts and window displays, constructing a rating scale for window displays, rating local window displays, setting up classroom window displays, dressing the windows of local merchants, publicizing these efforts through local newspapers.

Salesmanship students could handle sales campaigns for all school activities, and promote the sale of advertising for the school magazine. They may arrange for guest speakers, field trips to a local newspaper or advertising agency, prepare a scrapbook of advertisements, hold public speaking contests and an annual employer-employee dinner.

Techniques of Buying

Use reports, sketches, role playing, and research problems. Arrange a talk by a buyer. Use actual articles for demonstrations or discussions. Divide class into groups to analyse different brands of the same product. Have the students choose between four similar products. Discuss choices.

The Consumer

List articles that students buy. Discuss wants and needs. Use flash cards and ask the student to write down immediately the appeal to a basic human want shown on the card. Discuss these wants. Require the students to investigate the purchase of one of these articles and report on his findings. Analyse completely conditional sales contracts and credit blanks. Fill in each item for a particular purchase such as a car or a television set. Complete a contract form. Discuss shopping convenience offered by different stores in the community.

Laws and Ethics of Marketing

The laws of Marketing may be developed by the case methods. Principles should first be developed inductively by a study of simple cases and examples. These principles should then be applied in the solution of additional cases. Students should be given ample opportunity to discuss the case thoroughly before a decision is reached.

The ethics of marketing could be developed through speakers and through a study of the code of ethics of local and national groups.

Evolution of Marketing

Investigate and report on the history of major companies in the merchandising field; read and study biographies of prominent merchandisers.

Illustration, Colour and Design

Demonstrate the principles of colour and design. Construct a colour wheel, present samples of merchandise, and analyse the colour harmony and the principles of design involved. Invite a fashion co-ordinator to speak. Analyse and report on colour design in a local store, create seasonal displays, compare black and white advertising, and colour advertising. Give demonstrations utilizing the principles of colour and design. Co-ordinate Art and Marketing courses.

BIBLIOGRAPHY

GENERAL REFERENCE BOOKS

Bechman et al, Wholesaling, The Ronald Press

Cannon, J.T. and Wichert, J.A., Marketing, McGraw-Hill

Cheskin, L., Why People Buy, (Liverwright, New York) Smithers and Bonellie

Ernest and Davall, Salesmanship Fundamentals, 2nd Edition, McGraw-Hill

Galbraith, J.K., The Affluent Society, (Houghton Mifflin) Thomas Allen

Hoving, W., The Distribution Revolution, (Ives Washburn) Musson

Jones, Introduction to Marketing, Appleton-Century Crofts

Katona, W., The Powerful Consumer, McGraw-Hill

Krueger, C.W., Successful Real Estate Selling, McGraw-Hill

Levitt, T., Innovation in Marketing, McGraw-Hill

Mahoney, T., The Great Merchants, (Harper) Longmans Canada

Better Retailing, National Cash Register Co.

Packard, V., The Hidden Persuaders, Musson

Reagan, M., The Managed Economy, Oxford University Press

Richert, Retailing Principles and Practice, 4th Edition, Gregg

Rowse and Nolan, Fundamentals of Advertising, 6th Edition, Pitman

Seguin, G.E., Basic Retailing, Pitman

Shilt and Wilson, Business Principles and Management, 4th Edition, Gage

Tonne, Simon and McGill, Business Principles, Organization and Management, 2nd Edition, Gregg

Weiss, et al, Merchandising for Tomorrow, McGraw-Hill

Weiss et al, Man and the Modern Revolution, McGraw-Hill

Whiting, P.H., The Five Great Rules of Selling, McGraw-Hill

Wingate and Weiner, Retail Merchandising, 6th Edition, Gage

Whyte, W., The Organization Man, (Simon & Schuster) Musson

The Journal of Marketing, American Marketing Association, Chicago, Illinois

ORGANIZATION AND OPERATION

Shaffer, Harold, How to be a Successful Retailer in Canada, McGraw-Hill

DEVELOPMENT OF PERSONALITY

Carney, Etiquette in Business, McGraw-Hill

Fedder, A Girl Grows Up, McGraw-Hill

Halsy, Supervising People, (Harper) Longmans Canada

Lowen, You and Your Job, Collier-MacMillan

MacGibbon, Fitting Yourself for Business, McGraw-Hill

Manser, The Speaking Voice, Longmans Canada

Newton and Nichols, How to Improve Your Personality, McGraw-Hill

Reid, Personality and Etiquette, (Heath) Copp Clark

Stratton, Your Best Foot Forward, McGraw-Hill

MERCHANDISE KNOWLEDGE

Haas and Berry, Sales Horizons, Prentice-Hall

Logan and Moon, Facts About Merchandise, Prentice-Hall

Potter, Fiber to Fabric, McGraw-Hill

Wingate, Gillespie, Addison, Know Your Merchandise, (Gregg) McGraw-Hill

Sources of product information: trade journals; advertisements; customer approval, dealer literature, Canadian Association of Consumers; Government publications; radio and television, library reference materials, Consumer Reports; Consumer Research Bulletin.

SALESMANSHIP

Kirkpatrick, C.A., Salesmanship, Helping Prospects Buy, (South-Western) Gage

Literman, E.G., The New Art of Selling, (Harper) Copp Clark

Russell, Beach, Buskirk, Textbook of Salesmanship, McGraw-Hill

Wingate and Nolan, Fundamentals of Selling, 8th Edition, Gage

ADVERTISING AND SALES PROMOTION

Barton, R., Advertising Handbook, Prentice-Hall

Literman, E.G., The New Art of Selling, (Harper) Copp Clark

Dunn, S. Watson, Advertising, Holt, Rinehart & Winston

Kirkpatrick, C.A., Advertising, (Houghton, Mifflin) Nelson

Kleppner, O., Advertising Procedure, Prentice-Hall

National Cash Register Co., Advertise to Promote your Business, to Sell Your Goods, Attracting and Holding Customers, Display Selling, Making your Windows Work for You

Weiss & Weiss, 1010 Tested Ideas that Move Merchandise, McGraw-Hill

Wirsig, W., Printer's Ink - Advertising - Today, Yesterday, Tomorrow, McGraw-Hill

Marketing, MacLean-Hunter Publications

Canadian Printer & Publisher, MacLean-Hunter Publications

TECHNIQUES OF BUYING

The Buyer's Manual, A Merchandising Handbook, 1957, National Retail Merchants Association, 100 West 31st Street, New York

Kay, F., Purchasing for Industry and Public Undertakings, 1960, Pitman

MARKET RESEARCH AND ANALYSIS

Cole and Hancock, Consumer and Commercial Credit Management, General Publishing

Garn, R., The Magic of Emotional Appeal, Prentice-Hall

Literman, E.G., The New Art of Selling, (Harper) Copp Clark

McNelly, Adams, Olson, Business and Consumer Arithmetic, 5th Edition, Prentice-Hall

National Cash Register Co., How to Keep the Customers Buying

Wilson and Eyster, Consumer Economic Problems, 6th Edition, Gage

Wolfe, J., What Makes Women Buy, McGraw-Hill

LAW AND ETHICS OF MARKETING

Anger, Summary of Canadian Commercial Law, Pitman

Jennings, W.H., Canadian Law, Ryerson

CREDIT

Beckman, Credits and Collections: Management and Theory, McGraw-Hill
Readings in Credits and Collections in Canada, Ryerson

Brown and Davidson, Retailing Management, (Ronald Press) General Publishing

Chapin, Credit and Collection Principles and Practices, McGraw-Hill

Reddin, W.J., Successful Spending, Saving and Investing, McGraw-Hill

EVOLUTION OF MARKETING

Beard, M., The History of Business, 1962, (University of Michigan Press)
Ambassador

The History of Technology, Oxford Press

Newman, Peter, The Flame of Power, Longmans Canada

Who's Who in Canada, International Press, Toronto

ILLUSTRATION, COLOUR AND DESIGN

Chambers, Color and Design, Prentice-Hall

Graves, M., Color Fundamentals, McGraw-Hill

Graves, M. E., The Art of Colour and Design, 2nd Edition, McGraw-Hill

Scott, R.D., Design Fundamentals, McGraw-Hill

TRAFFIC, SHIPPING, TRANSPORTATION

Carrie, A.W., Economics of Transportation, University of Toronto Press

Chevrier, Lionel, The St. Lawrence Seaway, MacMillan of Canada

Steinburg and Hopkins, Economics and Evolution of Transportation, Pitman

MATERIALS HANDLING, FLOW AND STORAGE

Morrison, A., Storage and Control of Stock, 1962, Pitman